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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

▶ Do not enter social security numbers on this form as it may be made public.

▶ Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014, or tax year beginning 01-01-2014 , and ending 12-31-2014

Name of foundation IACocca Family Foundation		A Employer identification number 38-6071154	
Number and street (or P O box number if mail is not delivered to street address) 867 BOYLSTON STREET 6TH FLOOR		B Telephone number (see instructions) (617) 267-7747	
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02116		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 39,924,966		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	125,705			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	1,109,097	1,109,097		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	1,570,409			
	b Gross sales price for all assets on line 6a 7,416,359				
	7 Capital gain net income (from Part IV, line 2) . . .		1,570,409		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	2,805,211	2,679,506		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	408,272	40,827		367,445
	14 Other employee salaries and wages	20,685	0		20,685
	15 Pension plans, employee benefits	11,471	0		11,471
	16a Legal fees (attach schedule)	 10,058	0		10,058
	b Accounting fees (attach schedule)	 39,391	8,948		30,443
	c Other professional fees (attach schedule)	 20,822	224		20,598
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	 46,798	2,058		19,740
	19 Depreciation (attach schedule) and depletion . . .	11,334	0		
	20 Occupancy	79,890	7,989		71,901
	21 Travel, conferences, and meetings	19,999	0		19,999
	22 Printing and publications	533	53		480
	23 Other expenses (attach schedule)	 104,215	7,044		75,838
	24 Total operating and administrative expenses. Add lines 13 through 23	773,468	67,143		648,658
	25 Contributions, gifts, grants paid	848,709			916,209
	26 Total expenses and disbursements. Add lines 24 and 25	1,622,177	67,143		1,564,867
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	1,183,034			
	b Net investment income (if negative, enter -0-)		2,612,363		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	787,058	223,971	223,971
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ <u>246,827</u>			
		Less allowance for doubtful accounts ▶ _____	316,821	246,827	246,827
	4	Pledges receivable ▶ _____			
		Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____			
		Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	4,565	4,457	4,457
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	855,051	837,203	837,203
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____			
	Less accumulated depreciation (attach schedule) ▶ _____				
12	Investments—mortgage loans				
13	Investments—other (attach schedule)	35,758,951	36,539,973	36,539,973	
14	Land, buildings, and equipment basis ▶ <u>72,901</u>				
	Less accumulated depreciation (attach schedule) ▶ <u>51,843</u>	22,917	21,058	21,058	
15	Other assets (describe ▶ _____)	1,996,508	2,051,477	2,051,477	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	39,741,871	39,924,966	39,924,966	
Liabilities	17	Accounts payable and accrued expenses	9,506	7,394	
	18	Grants payable	1,210,000	1,032,500	
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	1,219,506	1,039,894	
	Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
24		Unrestricted	38,522,365	38,885,072	
25		Temporarily restricted			
26		Permanently restricted			
Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.					
27		Capital stock, trust principal, or current funds			
28		Paid-in or capital surplus, or land, bldg , and equipment fund			
29		Retained earnings, accumulated income, endowment, or other funds			
30		Total net assets or fund balances (see instructions)	38,522,365	38,885,072	
31		Total liabilities and net assets/fund balances (see instructions)	39,741,871	39,924,966	

Part III Analysis of Changes in Net Assets or Fund Balances		
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	138,522,365
2	Enter amount from Part I, line 27a	21,183,034
3	Other increases not included in line 2 (itemize) ▶ _____	30
4	Add lines 1, 2, and 3	439,705,399
5	Decreases not included in line 2 (itemize) ▶ _____	5820,327
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	638,885,072

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	VARIOUS		2014-01-01	2014-12-31
b	VARIOUS		2014-01-01	2014-12-31
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 2,030,344		2,031,488	-1,144
b 5,386,015		3,814,462	1,571,553
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			-1,144
b			1,571,553
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	1,570,409
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	}	3	

Part V

Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013	2,984,875	36,989,272	0 080696
2012	3,804,607	36,412,759	0 104486
2011	3,746,410	37,496,244	0 099914
2010	2,307,911	38,020,563	0 060702
2009	3,092,540	33,983,247	0 091002

2 Total of line 1, column (d).	2	0 436800
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 087360
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	39,207,703
5 Multiply line 4 by line 3.	5	3,425,185
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	26,124
7 Add lines 5 and 6.	7	3,451,309
8 Enter qualifying distributions from Part XII, line 4.	8	1,574,342

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See
the Part VI instructions

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	52,247
c		All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0
3		Add lines 1 and 2.		3	52,247
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	52,247
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014	6a	47,276	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c	25,000	
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments. Add lines 6a through 6d.		7	72,276
8		Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached		8	62
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	19,967
11		Enter the amount of line 10 to be Credited to 2015 estimated tax 19,967 Refunded		11	0

Part VII-AStatements Regarding Activities

1a		During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		1a	Yes	No
b		Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?		1b		No
		If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.				
c		Did the foundation file Form 1120-POL for this year?		1c		No
d		Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0 (2) On foundation managers \$ 0				
e		Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0				
2		Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		No
		If "Yes," attach a detailed description of the activities.				
3		Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		No
4a		Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		No
b		If "Yes," has it filed a tax return on Form 990-T for this year?		4b		
5		Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		No
		If "Yes," attach the statement required by General Instruction T.				
6		Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either				
		• By language in the governing instrument, or				
		• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		6	Yes	
7		Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.		7	Yes	
8a		Enter the states to which the foundation reports or with which it is registered (see instructions) MA, MI				
b		If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .		8b	Yes	
9		Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV		9		No
10		Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.		10		No

Part VII-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶IACOCCAFOUNDATION.ORG	13	Yes	
14	The books are in care of ▶THE FOUNDATION Telephone no ▶(617) 267-7747 Located at ▶867 BOYLSTON STREET 6TH FLOOR BOSTON MA ZIP +4 ▶02116			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶	16	Yes	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? <input type="checkbox"/> No Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?.	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

Yes No

(2)

Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

Yes No

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

Yes No

(4)

Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).

Yes No

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

Yes No

5b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

Organizations relying on a current notice regarding disaster assistance check here.

6a

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

Yes No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6b

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

Yes No

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

Yes No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

Yes No

7b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

2

Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total

number of other employees paid over \$50,000.

0

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3.	0

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	35,723,722
b	Average of monthly cash balances.	1b	1,282,749
c	Fair market value of all other assets (see instructions).	1c	2,798,304
d	Total (add lines 1a, b, and c).	1d	39,804,775
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	39,804,775
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	597,072
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	39,207,703
6	Minimum investment return. Enter 5% of line 5.	6	1,960,385

Part XI

Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	1,960,385
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	52,247
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	52,247
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,908,138
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,908,138
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,908,138

Part XII

Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	1,564,867
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	9,475
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,574,342
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,574,342
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				1,908,138
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2014				
a From 2009.	1,404,788			
b From 2010.	426,896			
c From 2011.	1,889,298			
d From 2012.	2,013,079			
e From 2013.	1,009,283			
f Total of lines 3a through e.	6,743,344			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 1,574,342				
a Applied to 2013, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2014 distributable amount.				1,574,342
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	333,796			333,796
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	6,409,548			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). . .	1,070,992			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	5,338,556			
10 Analysis of line 9				
a Excess from 2010. . . .	426,896			
b Excess from 2011. . . .	1,889,298			
c Excess from 2012. . . .	2,013,079			
d Excess from 2013. . . .	1,009,283			
e Excess from 2014. . . .				

Part XIV

Private Operating Foundations (see instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2014	(b) 2013	(c) 2012	(d) 2011	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . .					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

LEE A IACOCCA

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

KATHRYN IACOCCA HENTZ
867 BOYLSTON STREET 6TH FLOOR
BOSTON,MA 02116
(617) 267-7747

b

The form in which applications should be submitted and information and materials they should include

GRANT APPLICATION AT WWW.IACOCCAFUNDATION.ORG

c

Any submission deadlines

FEBRUARY 1

d

Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

PRIMARILY CONCERNED WITH DIABETES RESEARCH - RELATED ACTIVITIES

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	916,209
b Approved for future payment BETTY FORD CENTER 72301 COUNTRY CLUB DRIVE RANCHO MIRAGE, CA 92270		PC	UNRESTRICTED GRANT	30,000
MASSACHUSETTS GENERAL HOSPITAL 165 CAMBRIDGE STREET BOSTON, MA 02114		PC	RESTRICTED GRANT	1,000,000
NATIVITY PREPARATORY SCHOOL 39 LAMARTINE STREET JAMAICA PLAIN, MA 02130		PC	UNRESTRICTED GRANT	2,500
Total			3b	1,032,500

Enter gross amounts unless otherwise indicated

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Form **990-PF** (2014)

Part XVII

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
	***** _____ Signature of officer or trustee	2015-07-16 _____ Date	***** _____ Title


May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name THOMAS WASHBURN CPA	Preparer's Signature	Date 2015-07-15	Check if self-employed <input checked="" type="checkbox"/>	PTIN P00537319
	Firm's name <input checked="" type="checkbox"/> ALEXANDER ARONSON FINNING & CO PC			Firm's EIN <input checked="" type="checkbox"/> 04-2571780	
	Firm's address <input checked="" type="checkbox"/> 21 EAST MAIN STREET WESTBORO, MA 01581			Phone no (508) 366-9100	


Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
LEE A IACOCCA	CHAIRMAN 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
KATHRYN IACOCCA HENTZ	PRESIDENT 25 00	165,250	38,979	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
LOUIS LATAIF	SECRETARY / TREASURER 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
KENNETH ANDERSON	TRUSTEE 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
LIA IACOCCA ASSAD	TRUSTEE 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
SCOTT BLAIR	TRUSTEE 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
EDWARD BOUSA	TRUSTEE 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
JOHN GERACE	TRUSTEE 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
DESMOND HEATHWOOD	TRUSTEE 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
MARGARET LAURENCE	EXECUTIVE DIRECTOR 40 00	182,688	21,355	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ALZHEIMER'S ASSOCIATION 17771 COWAN IRVINE,CA 92614		PC	RESTRICTED GRANT	10,000
AMERICAN COLLEGE OF ENDOCRINOLOGY 245 RIVERSIDE AVENUE SUITE 200 JACKSONVILLE,FL 32202		PC	UNRESTRICTED GRANT	1,900
AMERICAN IRELAND FUND 211 CONGRESS STREET BOSTON,MA 02110		PC	UNRESTRICTED GRANT	6,625
ARCHDIOCESE OF BOSTON 66 BROOKS DRIVE BRAINTREE,MA 02184		PC	RESTRICTED GRANT	5,000
ARCHDIOCESE OF BOSTON 66 BROOKS DRIVE BRAINTREE,MA 02184		PC	RESTRICTED GRANT	5,000
BETH ISRAEL DEACONESS HOSPITAL - NEEDHAM OFFICE OF DEVELOPMENT NEEDHAM,MA 02492		SO1	UNRESTRICTED GRANT	1,000
BOSTON RESCUE MISSION PO BOX 849100 BOSTON,MA 022849100		PC	RESTRICTED GRANT	1,000
BREWSTER ACADEMY 80 ACADEMY DRIVE WOLFEBORO,NH 03894		PC	UNRESTRICTED GRANT	25,000
BROADCASTERS FDN OF AMERICA 125 WEST 55TH STREET NEW YORK,NY 10019		PF	RESTRICTED GRANT	2,550
CANYON CLUB INC 20456 LAGUNA CANYON ROAD LAGUNA BEACH,CA 92651		PC	UNRESTRICTED GRANT	2,500
CANYON CLUB INC 20456 LAGUNA CANYON ROAD LAGUNA BEACH,CA 92651		PC	UNRESTRICTED GRANT	2,500
CANYON CLUB INC 20456 LAGUNA CANYON ROAD LAGUNA BEACH,CA 92651		PC	UNRESTRICTED GRANT	2,500
CARE HOUSE OF OAKLAND COUNTY 410 WHIPPERS IN COURT BLOOMFIELD HILLS,MI 48302		PC	RESTRICTED GRANT	5,000
CAROLINA HEALTHCARE FNDN CAROLINA HEALTHCARE FOUNDATION CHARLOTTE,NC 28232		PC	RESTRICTED GRANT	2,000
CATHOLIC CHARITIES OF LOS ANGELES 211 THIRD AVENUE VENICE,CA 90291		PC	UNRESTRICTED GRANT	4,620
Total  3a				916,209


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CLERGY HEALTH AND RETIREMENT TRUST ARCHDIOCESE OF BOSTON BROOKS DRIVE,MA 02184		PC	UNRESTRICTED GRANT	2,000
COMMUNITY SERVICE PROGRAMS INC ROSE SHIRAZI SANTA ANA,CA 92705		PC	RESTRICTED GRANT	1,500
COMO PARK ZOO & CONSERVATORY 1225 ESTABROOK DRIVE ST PAUL,MN 55103		PC	UNRESTRICTED GRANT	1,000
DENISON UNIVERSITY PO BOX 716 GRANVILLE,OH 430239989		PC	UNRESTRICTED GRANT	1,000
DENISON UNIVERSITY PO BOX 716 GRANVILLE,OH 430239989		PC	UNRESTRICTED GRANT	1,000
EARICLES 1505 MANZANITA LANE MANHATTAN BEACH,CA 90266		PC	UNRESTRICTED GRANT	2,500
FREEDOM INSTITUTE 515 MADISON AVE NEW YORK,NY 10022		PC	UNRESTRICTED GRANT	1,000
GROTON SCHOOL 282 FARMERS ROW GROTON,MA 01450		PC	RESTRICTED GRANT	5,000
HAND IN PAW 2598 STARCREST DRIVE DUARTE,CA 91010		PC	UNRESTRICTED GRANT	2,500
HOAG HOSPITAL FOUNDATION 500 SUPERIOR AVENUE NEWPORT BEACH,CA 92663		PC	RESTRICTED GRANT	1,500
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO,CA 92675		PC	RESTRICTED GRANT	6,000
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO,CA 92675		PC	RESTRICTED GRANT	2,500
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO,CA 92675		PC	RESTRICTED GRANT	6,000
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO,CA 92675		PC	RESTRICTED GRANT	7,000
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO,CA 92675		PC	RESTRICTED GRANT	5,000
Total  3a				916,209

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO,CA 92675		PC	RESTRICTED GRANT	1,500
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO,CA 92675		PC	RESTRICTED GRANT	1,500
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO,CA 92675		PC	UNRESTRICTED GRANT	10,000
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO,CA 92675		PC	UNRESTRICTED GRANT	13,000
KEEP MEMORY ALIVE 888 W BONNEVILLE AVENUE LAS VEGAS,NV 89106		PC	RESTRICTED GRANT	12,800
KEEP MEMORY ALIVE 888 W BONNEVILLE AVENUE LAS VEGAS,NV 89106		PC	RESTRICTED GRANT	10,000
LA COUNTY POLICE CANINE ASSOCIATION 1223 WILSHIRE BLVD SANTA MONICA,CA 90403		PC	UNRESTRICTED GRANT	1,000
LAGUNA NIGUEL MILITARY SUPPORT FUND BRUD LETOURNEAU LAGUNA NIGUEL,CA 92677		PC	RESTRICTED GRANT	500
LAGUNA NIGUEL MILITARY SUPPORT FUND BRUD LETOURNEAU LAGUNA NIGUEL,CA 92677		PC	UNRESTRICTED GRANT	1,000
LEHIGH UNIVERISTY GLOBAL VILLAGE 111 RESEARCH DRIVE IACOCCA HALL BETHLEHEM,PA 18015		PC	RESTRICTED GRANT	20,985
LEHIGH UNIVERISTY GLOBAL VILLAGE 111 RESEARCH DRIVE IACOCCA HALL BETHLEHEM,PA 18015		PC	RESTRICTED GRANT	3,450
MAKE A WISH ALABAMA ATTN BRANDYN DUPREE TUSCALOOSA,AL 35402		PC	UNRESTRICTED GRANT	1,000
MAKE A WISH ALABAMA ATTN BRANDYN DUPREE TUSCALOOSA,AL 35402		PC	UNRESTRICTED GRANT	500
MANNA PROJECT INTERNATIONAL LORI SCHARFFENBERG WARREN NASHVILLE,TN 37212		PC	RESTRICTED GRANT	30,000
MARIAN HIGH SCHOOL 7225 LAHSER ROAD BLOOMFIELD HILLS,MI 48301		PC	UNRESTRICTED GRANT	1,000
Total  3a				916,209


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
MIDDLEBURY COLLEGE COLLEGE ADVANCE MENT MIDDLEBURY,VT 05753		PC	RESTRICTED GRANT	25,000
NANTUCKET COTTAGE HOSPITAL FOUNDATION 57 PROSPECT STREET NANTUCKET,MA 025542799		PC	RESTRICTED GRANT	13,250
NATIONAL STUTTERING ASSOCIATION 119 W40TH STREET NEWYORK,NY 10018		PC	UNRESTRICTED GRANT	2,500
OBLATES OF THE VIRGIN MARY SEMINARIAN FUN ST CLEMENT EUCHARISTIC SHRINE BOSTON,MA 02215		PC	UNRESTRICTED GRANT	1,000
PARENTS AGAINST LEUKEMIA 14609 DEERVALE PLACE SHERMAN OAKS,CA 91403		PC	UNRESTRICTED GRANT	5,000
PEPPERDINE UNIVERSITY 24255 PACIFIC COAST HIGHWAY MALIBU,CA 902634898		PC	UNRESTRICTED GRANT	2,500
PROMISES FOUNDATION PO BOX 662087 LOS ANGELES,CA 90066		PF	UNRESTRICTED GRANT	10,000
PROVIDENCE TARZANA MEDICAL CENTER 18321 CLARK STREET TARZANA,CA 91356		PC	RESTRICTED GRANT	1,000
SAINT MARY PARISH 133 SCHOOL STREET WALTHAM,MA 02451		PC	UNRESTRICTED GRANT	5,000
SAN GABRIEL JR GOLF INC PO BOX 1675 DUARTE,CA 90019		PC	UNRESTRICTED GRANT	5,000
SECOND HARVEST FOOD BANK OF ORANGE COUNTY 8014 MARINE WAY IRVINE,CA 92618		PC	UNRESTRICTED GRANT	1,000
SHARE SPACE FOUNDATION C/O CALLAS CARLSON LOS ANGELES,CA 90025		PC	RESTRICTED GRANT	5,000
ST BARTHOLOMEW PARISH 1180 GREENDALE AVENUE NEEDHAM,MA 02492		PC	RESTRICTED GRANT	400
ST BARTHOLOMEW PARISH 1180 GREENDALE AVENUE NEEDHAM,MA 02492		PC	RESTRICTED GRANT	36,082
ST BARTHOLOMEW PARISH 1180 GREENDALE AVENUE NEEDHAM,MA 02492		PC	UNRESTRICTED GRANT	200
Total  3a				916,209

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ST CATHERINE OF SIENA SCHOOL 30516 SOUTH COAST HIGHWAY LAGUNA BEACH,CA 92651		PC	UNRESTRICTED GRANT	10,000
ST DUNSTAN'S EPISCOPAL CHURCH 18 SPRINGDALE AVENUE DOVER,MA 02030		PC	RESTRICTED GRANT	2,500
ST FRANCIS CHAPEL 800 BOYLSTON STREET BOSTON,MA 02199		PC	UNRESTRICTED GRANT	5,000
ST JOSEPH'S PARISH 1382 HIGHLAND AVENUE NEEDHAM,MA 024922694		PC	RESTRICTED GRANT	2,500
ST JOSEPH'S PARISH 1382 HIGHLAND AVENUE NEEDHAM,MA 024922694		PC	UNRESTRICTED GRANT	10,000
ST SEBASTIAN'S SCHOOL 1191 GREENDALE AVENUE NEEDHAM,MA 02492		SO1	UNRESTRICTED GRANT	20,000
ST VINCENT MEALS ON WHEELS 2131 WEST THIRD STREET LOS ANGELES,CA 90057		PC	UNRESTRICTED GRANT	10,000
THE BRENT SHAPIRO FOUNDATION 10250 CONSTELLATION BOULEVARD 18TH FLOOR LOS ANGELES,CA 90067		PC	UNRESTRICTED GRANT	5,000
THE BRENT SHAPIRO FOUNDATION 10250 CONSTELLATION BOULEVARD 18TH FLOOR LOS ANGELES,CA 90067		PC	UNRESTRICTED GRANT	5,000
THE CATHOLIC APPEAL ARCHDIOCESAN PASTORAL CENTER BRAINTREE,MA 02184		PC	UNRESTRICTED GRANT	5,000
UCLA HEALTH SCIENCES DEPARTMENT DIVISION OF GERIATRICS LOS ANGELES,CA 90095		PC	RESTRICTED GRANT	50,000
UCLA UNICAMP 900 HILGARD AVENUE LOS ANGELES,CA 90024		PC	UNRESTRICTED GRANT	1,500
UNIVERSITY OF CALIFORNIA - IRVINE 101 ACADEMY WAY IRVINE,CA 92617		PC	RESTRICTED GRANT	5,000
UNIVERSITY OF MIAMI SCHOOL OF MEDICINE DIABETES RESEARCH INSTITUTE MIAMI,FL 33136		PC	RESEARCH GRANT	185,540
UNIVERSITY OF SOUTHERN CALIFORNIA USC ATHLETICS HERITAGE HALL LOS ANGELES,CA 90089		PC	RESTRICTED GRANT	1,000
Total  3a				916,209

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF SOUTHERN CALIFORNIA USC ATHLETICS HERITAGE HALL LOS ANGELES,CA 90089		PC	UNRESTRICTED GRANT	1,000
VALPARAISO UNIVERSITY SCHOOL OF LAW 656 S GREENWICH STREET VALPARAISO,IN 46383		PC	RESTRICTED GRANT	1,500
VANDERBILT UNIVERSITY MEDICAL CENTER 1400 18TH AVE SOUTH NASHVILLE,TN 372122809		PC	RESEARCH GRANT	232,307
WAKE FOREST UNIVERSITY PO BOX 7227 WINSTONSALEM,NC 27109		PC	UNRESTRICTED GRANT	1,000
WOMEN'S GUILD -CEDARS-SINAI MEDICAL CENTE 5670 WILSHIRE BLVD SUITE 830 LOS ANGELES,CA 90048		PC	RESTRICTED GRANT	10,000
YELLOWSTONE RECOVERY 154 E BAY STREET COSTA MESA,CA 92627		PC	UNRESTRICTED GRANT	2,000
ZENO MOUNTAIN FARM 950 ZENO ROAD LINCOLN,VT 05443		PC	UNRESTRICTED GRANT	6,500
Total  3a				916,209

<div>Schedule B</div> <div>(Form 990, 990-EZ, or 990-PF)</div> <div>Department of the Treasury Internal Revenue Service</div>	<div>Schedule of Contributors</div> <div>▶ Attach to Form 990, 990-EZ, or 990-PF.</div> <div>▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.</div>	<div>OMB No 1545-0047</div>
		<div>2014</div>

<div>Name of the organization</div> <div>IACocca Family Foundation</div>	<div>Employer identification number</div> <div>38-6071154</div>
--	---

Organization type (check one)

<div>Filers of:</div> <div>Form 990 or 990-EZ</div>	<div>Section:</div> <div><div><input type="checkbox"/> 501(c)() (enter number) organization</div><div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation</div><div><input type="checkbox"/> 527 political organization</div></div>
<div>Form 990-PF</div>	<div><div><input checked="" type="checkbox"/> 501(c)(3) exempt private foundation</div><div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation</div><div><input type="checkbox"/> 501(c)(3) taxable private foundation</div></div>

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Employer identification number
38-6071154

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>1</u>	IACOCCA CLUT FBO ARIANNA ASSAD C/O WILMINGTON TRUST LOS ANGELES, CA 90067 	\$ <u>98,073</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
<u>2</u>	SPORTS ZONE INC 108 MARGO LANE FAYETTVILLE, NY 13066 	\$ <u>9,750</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
<u>3</u>	THOMAS J SMACH REV TRUST 4504 SPRUCE RIDGE DRIVE MANLIUS, NY 13104 	\$ <u>8,750</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
<u> </u>	 	\$ <u> </u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
<u> </u>	 	\$ <u> </u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
<u> </u>	 	\$ <u> </u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization IACOCCA FAMILY FOUNDATION	Employer identification number 38-6071154
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Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	_____ \$	_____

Name of organization IACOCCA FAMILY FOUNDATION	Employer identification number 38-6071154
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Part III

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$ _____

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	

TY 2014 Accounting Fees Schedule

Name: IACocca Family Foundation

EIN: 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	39,391	8,948		30,443

**TY 2014 Investments Corporate
Stock Schedule**

Name: IACocca Family Foundation
EIN: 38-6071154

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PUBLICLY TRADED SECURITIES	837,203	837,203

TY 2014 Investments - Other Schedule**Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MUTUAL FUNDS	FMV	35,393,207	35,393,207
CASH HELD FOR INVESTMENTS	FMV	646,766	646,766
KINETA INVESTMENT LOAN	FMV	500,000	500,000

TY 2014 Land, Etc. Schedule

Name: IACocca Family Foundation

EIN: 38-6071154

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
EQUIPMENT	72,901	51,843	21,058	21,058

TY 2014 Legal Fees Schedule

Name: IACOCCA FAMILY FOUNDATION

EIN: 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	10,058	0		10,058

TY 2014 Other Assets Schedule

Name: IACOCCA FAMILY FOUNDATION

EIN: 38-6071154

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
CSV LIFE INSURANCE POLICY	1,996,508	2,051,477	2,051,477

TY 2014 Other Decreases Schedule

Name: IACocca Family Foundation

EIN: 38-6071154

Description	Amount
UNREALIZED LOSS	820,327

TY 2014 Other Expenses Schedule**Name:** IACocca FAMILY FOUNDATION**EIN:** 38-6071154

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SUPPLIES	7,468	747		6,721
TELEPHONE	9,557	956		8,601
POSTAGE, SHIPPING & DELIVERY	3,072	307		2,765
INSURANCE	42,113	4,211		37,902
OUTSIDE COMPUTER SERVICES	1,775	178		1,597
PAYROLL PROCESSING FEES	2,838	284		2,554
STORAGE	2,160	0		2,160
MISCELLANEOUS	8,138	361		7,738
MEMBERSHIP DUES	5,800	0		5,800
BAD DEBT	21,294	0		0

TY 2014 Other Professional Fees Schedule

Name: IACocca Family Foundation

EIN: 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER	20,764	166		20,598
INVESTMENT	58	58		0

TY 2014 Taxes Schedule**Name:** IACocca FAMILY FOUNDATION**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	21,798	2,058		19,740
EXCISE TAX	25,000	0		0